

**Important:** Fill out in block letters and answer each section as accurately as possible.

**Section A – Collection, Use and Communication of Your Personal Information**

Through this form, UV Insurance collects your personal information in order to process your total or partial cash value, in particular by paying you the amount of money indicated in section C, D or E.

Your personal information may also be used specifically to:

- ▶ Confirm your identity;
- ▶ Establish and update the profile, needs, and objectives;
- ▶ Comply with legal and regulatory requirements (e.g., to prevent, detect or suppress offences, cyber threats, and fraud).

Contract # \_\_\_\_\_

First name of the insured or annuitant \_\_\_\_\_ Last name \_\_\_\_\_

**Section B – Contract Owner Identification**

**Owner**

1. First name \_\_\_\_\_ Last name \_\_\_\_\_

2. Date of birth \_\_\_\_\_ 3. Social Insurance Number \_\_\_\_\_

**Co-Owner**

1. First name \_\_\_\_\_ Last name \_\_\_\_\_

2. Date of birth \_\_\_\_\_ 3. Social Insurance Number \_\_\_\_\_

**Section C – Surrender – Life Insurance**

**Note:** A partial or total surrender may result in tax consequences and be taxable as income. A total surrender terminates the coverage. In the case of a partial surrender, the insurance amount in force may be reduced in accordance with the contractual provisions.

**Life Insurance**

Total surrender amount \$ \_\_\_\_\_ or partial surrender amount \$ \_\_\_\_\_

**Universal Life Insurance**

Total surrender amount \$ \_\_\_\_\_ or partial surrender amount \$ \_\_\_\_\_  Gross  Net

| Fund surrender choice          | \$ or % or number of units | Fund surrender choice                 | \$ or % or number of units |
|--------------------------------|----------------------------|---------------------------------------|----------------------------|
| Canadian Shares (S&P/TSX 60)   |                            | Money Market                          |                            |
| American Shares (S&P 500)      |                            | Guaranteed interest rate for 1 year   |                            |
| Global Shares (MSCIW)          |                            | Guaranteed interest rate for 3 years  |                            |
| Technology Shares (NASDAQ 100) |                            | Guaranteed interest rate for 5 years  |                            |
| Canadian Bond Fund (Scotia)    |                            | Guaranteed interest rate for 10 years |                            |

**Section D – Surrender – Critical Illness Insurance**

**Note:** The refund of all premiums terminates the coverage. In the case of a partial refund of premiums, the insurance amount in force may be reduced in accordance with the contractual provisions.

**Critical Illness Insurance**

Total refund of premiums

Partial refund of premiums \$ \_\_\_\_\_ or % \_\_\_\_\_

